How do I get a new branch location added to our WMS?

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Applies to
• WMS Circulation
• WMS Acquisitions
• WorldCat Discovery

Answer
The addition of a new branch/location to WorldShare Management services requires coordination between the local library and OCLC Customer support. Once you are sure you want to add a new location, pull together the following pieces of information:

• What display name do you want the new location to have?
• What Holding library code do you want the new location to have?
• What shelving locations will it have?
• Do you want to be able to filter search results by the new location?
• Do you want this location to be a Hold pickup location?
• Will there be any loan policy differences for this location?

Once you’ve gathered this information, follow these steps to start the process:

1. Create a new WorldCat Registry record for the branch location in Service Configuration > WorldCat Registry > Create a New Institution.
   ◦ Note: If the institution already exists, just note the Registry ID and send it in the email to us below.

2. Add a line to the Service Configuration > WorldCat Discovery and WorldCat Local > Holding Codes & Shelving Location messages table with the desired Holding Symbol, Holding Code, Display name, Shelving Scheme and Shelving Locations.
   ◦ Caution:
     ▪ You must specify at least one shelving location.
     ▪ Do not add anything to the Branch Registry ID column.

3. Send an email to OCLC Support that includes the following information:
   ◦ The display name you used when you created the new WorldCat Registry institution record or the Registry ID already assigned to it
   ◦ The preferred new Holding library code
- Whether or not you want this location added to your list of Hold Pickup locations
- Whether or not you want to be able to filter searches by the new location

4. OCLC Customer support will pass your information on to our Profiling staff so they can perform the steps needed on their side and get back to you when they’re done.

5. At that point you can go into the Loan policy settings to add any lines you need for the site.

Additional information

Once your Institution record is created you can add it to your Branches and Affiliates list if the location is a branch of your library.